1. Support Services Report Template

Report Info

Name of the person completing this report: Debbie Chaw
Title of the person completing this report: Exec. Dir. of Adv Svcs & Foundations
Supervisor/dean reviewing report: Ara Serjoie
Service: Database Mgmt and Integrity
Division/College: University Advancement

3. Mandated Service

Link to Scoring Rubric

1.1 Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

Federal Law: N/A
State Law: N/A
Executive Order: N/A
Title 5: N/A
Campus Policy: N/A
Any other: N/A

Provide a brief explanation, if necessary, in < 60 words.

Having a donor database is not legally mandated; however, the database is used to record and maintain the gift records for donors. This information is used to generate the legally mandated gift receipts. This can have direct bearing on our ability to fulfill legal functions with respect to our philanthropic efforts on behalf of the university.

4. Importance of Service

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words

Maximize benefits for all end-users deriving from the proper use of Advancement's fundraising and prospect research database applications, which track alumni, donor, and prospect research information including biographical information, memberships, contributions, contact history and wealth information. This includes analyzing the data, identifying and performing data-clean up projects, utilizing various sources to update biographical and personal information, and implementing processes to collect new data and updates. This service also provides information in the form of lists and reports of alumni, donors, etc., to colleges, departments, fundraising and alumni relations staff.

Having complete and accurate data of alumni and donors is instrumental to university advancement's fundraising and friend-raising efforts.

Link to Scoring Rubric

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

Administrators/staff: 30%
Colleges/departments: 40%
Students: 10%
Faculty: 20%
2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student Impact Areas listed below (for example processing financial aid applications would be direct impact on students while managing utility services would be indirect).

<table>
<thead>
<tr>
<th></th>
<th>Direct Impact on Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students enter the system)</td>
<td>🟢</td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td>🟢</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
<td>🟢</td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your selection for each area.

<table>
<thead>
<tr>
<th></th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students enter the system)</td>
<td>Data is used to generate lists used in fundraising efforts which may yield gifts to support programs associated with this area.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Data is used to generate lists used in fundraising efforts which may yield gifts to support programs associated with this area.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Data is used to generate lists used in fundraising efforts which may yield gifts to support programs associated with this area. Data is also used to maintain relationship with alumni for communications purposes about alumni-related and university activities.</td>
</tr>
</tbody>
</table>

2.3 Applying the four choices presented below, please indicate the consequence of NOT having this service on each of the actions in the left hand column.

<table>
<thead>
<tr>
<th></th>
<th>4 - Service provides evidence of direct impact in more than one area</th>
<th>3 - Service provides evidence of direct impact in one area</th>
<th>2 - Service provides evidence of indirect impact in more than one area</th>
<th>1 - Service provides evidence of indirect impact in one area</th>
</tr>
</thead>
<tbody>
<tr>
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Provide a brief narrative (<60 words each) explaining your choice.

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<thead>
<tr>
<th></th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students enter the system)</td>
<td>List of Foundation and Corporate donors who support these programs are generally small; data may not necessarily need to be maintained in an alumni/donor database.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Not having and/or maintaining an alumni/donor database makes it extremely difficult for the university to maintain contact with their alumni and will hinder fundraising, alumni relations.</td>
</tr>
</tbody>
</table>
Not having and/or maintaining an alumni/donor database makes it extremely difficult for the university to maintain contact with their alumni and will hinder fundraising, alumni relations and communications efforts. Relationship building and job-networking is easier if data is readily available.

### Link to Scoring Rubric

#### 2.4 Alignment with Shared Strategic Commitments

How does this service contribute to or align with any of the eight Shared Strategic Commitments (SSC) listed below?

<table>
<thead>
<tr>
<th>SSC Description</th>
<th>If aligned or contributing, provide a description. (&lt;60 words for each SSC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</td>
<td>N/A</td>
</tr>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development</td>
<td>N/A</td>
</tr>
<tr>
<td>Serve students first, by expanding access and enhancing each student's educational experience and prospects for success as a graduate and life-long learner</td>
<td>Scholarship and program funding usually comes from alumni and friends of CSUEB. Having an alumni/donor database with accurate and good information helps development staff secure private support form alumni and friends.</td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td>N/A</td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td>Having an alumni/donor database that is accurate and updated consistently helps to reduce direct mail costs since there should be less returned mail. Also, assuming that there is less wasted material used because of lower volume of returned mail, this contributes to sustainability.</td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>Having an alumni/donor database that is accurate and updated consistently improves various services provided within the division and makes those services more efficient.</td>
</tr>
<tr>
<td>Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility</td>
<td>N/A</td>
</tr>
<tr>
<td>Demonstrate our continuing record of leadership and innovation in higher education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM)</td>
<td>N/A</td>
</tr>
</tbody>
</table>

### Link to Scoring Rubric

#### 2.5 How might the demand for this service change over the next five years? (Please choose one category below).

Likely to increase

Provide a rationale for your choice (assumptions, impact of new policy, etc.) in <120 words.

In order to increase the ability to reach our alumni and improve our fundraising, it is critical that our database contains the most accurate information as possible. Major clean-up projects will be required over the next couple of years to help with this effort. Additionally, having a more robust annual fund will require more data segmentation which will lead to more lists and reports generated.
5. Quality of Service

3.1 Do you assess the quality of the service you provide?

Yes

If “Yes”, what benchmarks, best practices or measures of success, either internal or external, do you use to measure service quality (e.g., timeliness, accuracy, adequacy, meeting deadlines, satisfactory completion of assignment, etc.)? Please describe in <120 words. If no, please explain.

Generation of list pulls and reports are generally measured by timeliness. Some projects or activities have specific deadlines. Informal discussions with staff using the data or requesting lists/reports have been held to determine their level of satisfaction. For some mailing projects, we track the number of pieces returned with bad addresses.

3.2 During the last three years, have you adopted any measures to improve the quality of this service? Please describe in <120 words.

Policies and processes have been implemented related to creating and maintaining records. The ability to create and update records is limited to certain staff instead of all staff members. The process has been standardized and documented for training purposes. Obtaining student/graduate information from planning & enrollment has been standardize, but this process still needs to be more efficient.

3.3 What idea(s) do you have for improving the quality of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in < 120 words.

Implement processes to ensure that electronic update files from vendors used by the annual fund and university magazine are incorporated into the update process on a standard schedule. Improve the process for obtaining student/graduate data and uploading the data into the database.

3.4 What ideas do you have for improving the quality of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Our database is in dire need of a major overhaul and clean-up. The upshot of doing so is in the interest of the university as we seek to connect with alumni and generate additional resources from fundraising. The downside of not doing so would be a detriment to the university both in the short-term and the long-run. Additional resources are needed to hire staff with increased knowledge and better skills which would definitely upgrade this service. A pure data “jock” who has excellent data analytical skills, is process oriented and understands Raiser’s Edge would be valuable. Having crystal report writing skills would be an additional plus.

3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?

Yes

If yes, describe the process and most recent results in <120 words. If no, please explain.
Informal discussions with university advancement staff who are using the data or have requested lists or reports have provided feedback. While there have been some improvement in the level of service and satisfaction, staff members have expressed frustration with the integrity of the data and some reports.

3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.

N/A

3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?

Yes

If yes, please describe in <120 words. If no, please explain

Informal guideline - staff understand that the users of the data are for the most part internal clients who should be treated as if they were external clients. All end-users of the data are our customers!

3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?

No

If yes, describe the annual quality goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

There are no annual quality goals. The database is maintained to the best of our current ability with work activities and projects performed when requested.

3.9 Does your service have annual goals (targets) of achievement regarding the quantity of service provided?

No

If yes, describe the annual quantity goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

There are no annual quantity goals. The database is maintained to the best of our current ability with work activities and projects performed when requested. There is no set goal of the number of records needing updates.

6. Efficiency of Service (cost effectiveness)

4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

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Attach your allocated spreadsheet here.
4.2 Using the spreadsheet provided, please distribute your department’s annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.

4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing this service (e.g. reducing salary costs, operating expenses or use of space, or increased output without increasing cost. Etc.)?

   Yes

   If yes, please describe the measures in <120 words. If this is a new service introduced over the past three years, please indicate. If no, please explain.

   Implementing standardize processes and procedures has helped to make the service a little more productive. Additionally, more experience with the database year-over-year has helped the main provider of the service become a little more productive.

4.5 What idea(s) do you have for improving the efficiency (cost effectiveness) of this service within existing resources (e.g. restructuring, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.

   Reassigning some duties among current staff may help improve the service.

4.6 What idea(s) do you have for improving the efficiency (cost effectiveness) of the service if additional resources were provided. Please describe your idea(s) in <120 words.

   Since it is all about the data, we would use additional resources to perform various clean-up projects (email and phone appends, lost alumni, etc) which could be expensive since these types of projects are outsourced. However, having better data will lead to cost effectiveness for fundraising, alumni relations and communications as they reach out to alumni via phone, email and regular mail.

4.7 Do you have any plan(s) to improve the efficiency (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?

   No

   If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.
Cost effectiveness will be achieved in other services provided by university advancement (annual fund, development, alumni relations and university magazine) by improving and maintaining the database. In order to improved the accuracy of the data, costs will need to increase before cost effectiveness can be achieved. Once the data is relatively cleaned, then maintenance costs on an annual basis will be reduced and cost effectiveness will be achieved.

**Link to Scoring Rubric**

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

Number of updates or new records added was not tracked. Number of list and reports requested was not tracked.

**7. Other**

**Link to Scoring Rubric**

5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

No

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in < 60 words.

I do not know if departments or colleges are maintaining a shadow database.

**Link to Scoring Rubric**

5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

N/A

**Link to Scoring Rubric**

5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

The first building block to successful fundraising and alumni relations programs is to know your alumni and to be able to contact them. Having an alumni/donor database which captures this information, is regularly updated, is analyzed on a regular basis and yields relevant information is an essential component of any university advancement infrastructure.